

FIG. 2

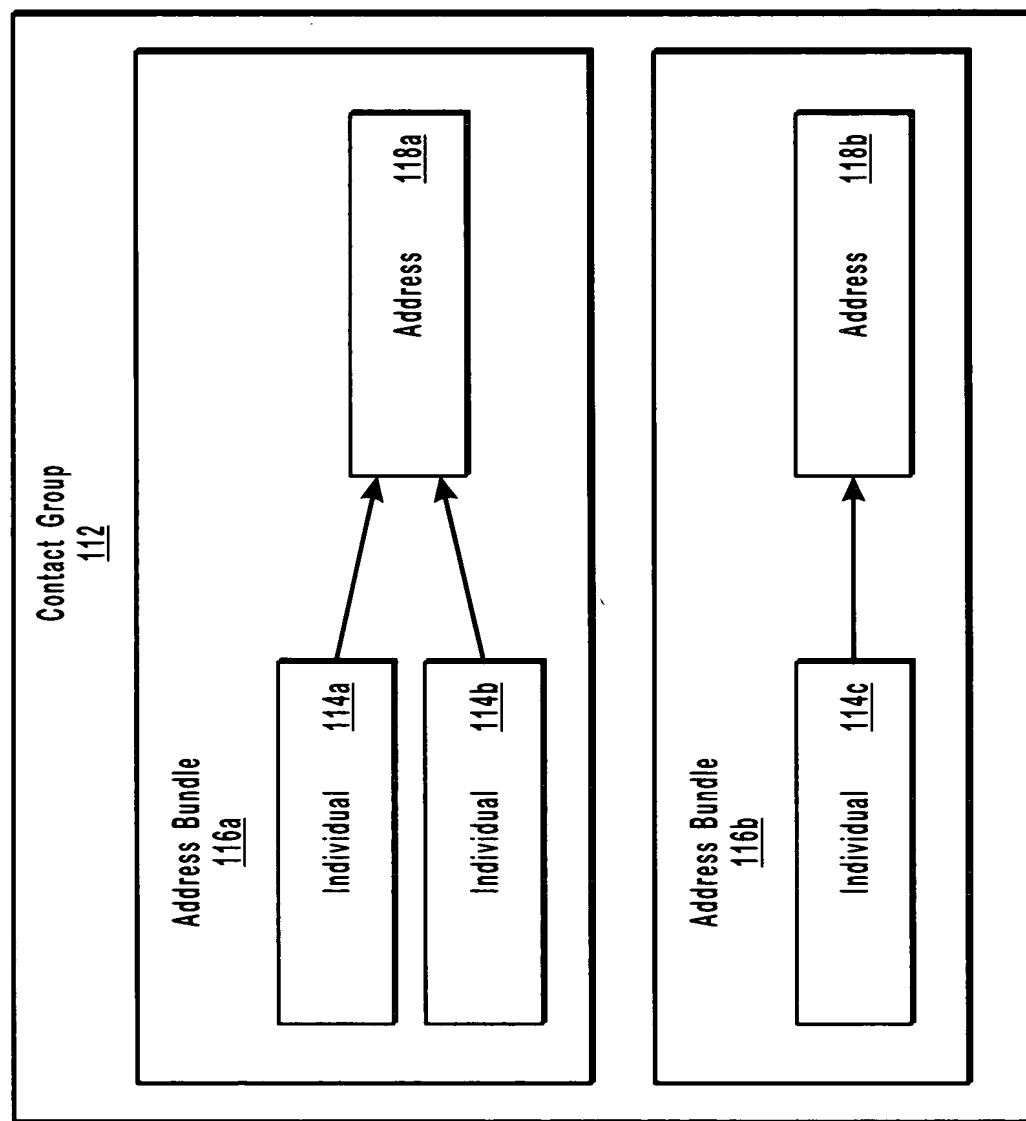


FIG. 3A

116

301

302

Address Bundle

Manual

Use Mail Merge

Address Bundle

Curie-Clinic (Primary Business)

Curie-Laboratory

Curie-Clinic (Primary Business)

Primary Home

Dr. Pierre Curie, M.D.

First Addressee

Second Addressee

Dr. Marie Sklodowska Curie

Salutation

Doctors Curie

Destination Override

The Radiology Institute of Utah 53

FIG. 3B

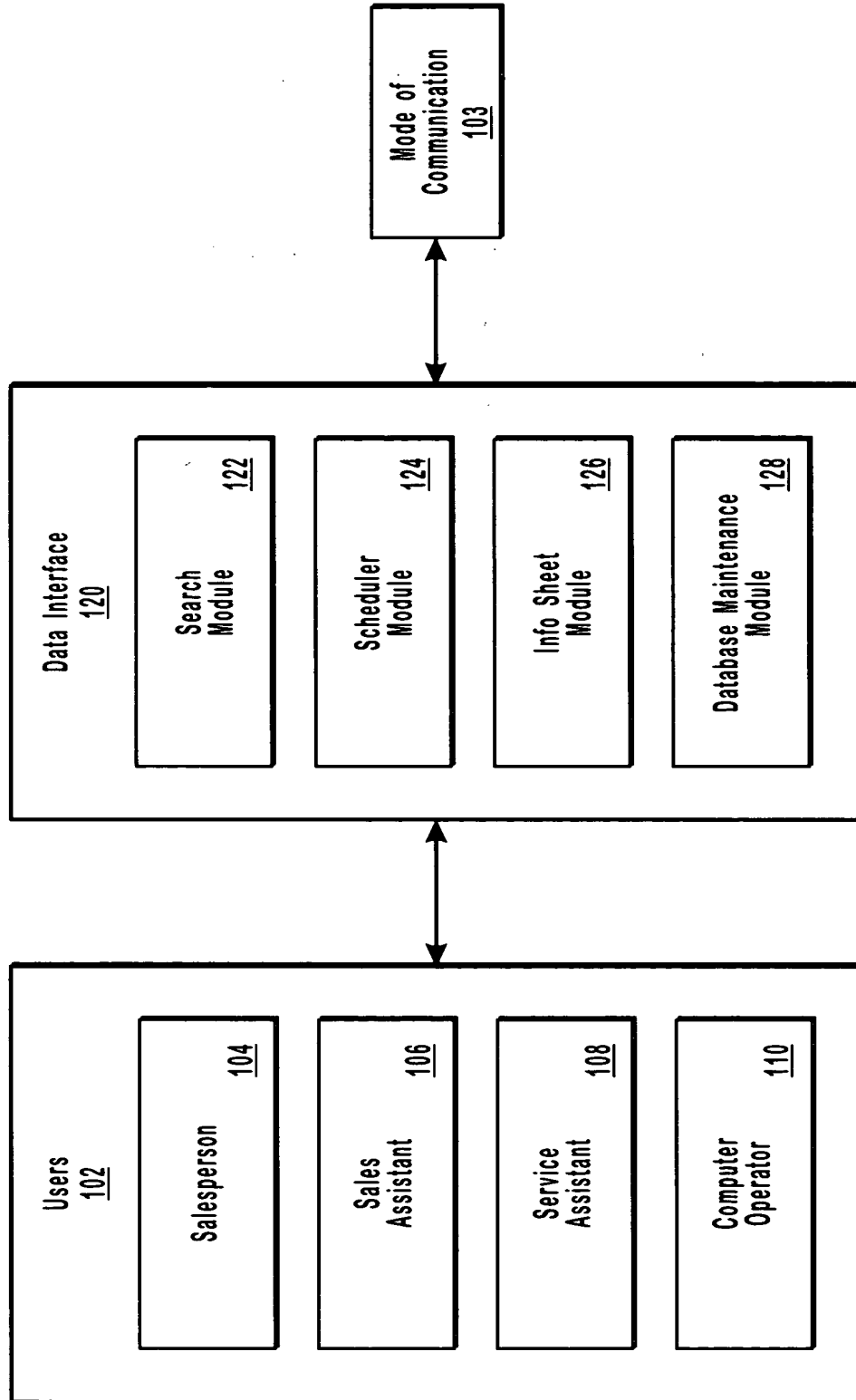


FIG. 4





**FIG. 6**

T 03020" 4690060

126

703

701

702

8 / 21

Corilla 2.0 [Playground] [InfoSheet: Alighieri/Portinari]

File Messaging Tools Reports Campaigns Import & Export View Window Help

Search [ ] Record 1 of 52

Next Contact: Future Date: [ ] PROSPECT [A - RESPONSIVE] 3:50:59K [TEACHER/CLERY] [NORMAL] [REFERRAL] 3/11/2010 [9/27/2000] 3/11/2010 [No Contact Interval: 90] [Opportunity Review Interval: 180] [Letter] [auto-email] [update]

Group: [ ]

Alighieri/Portinari

Salutation: Prof. Alighieri

www.west.edu/academics/faculty/alighieri.html

History [Individual] [Campaigns/Workitems] [Opportunities] [Keywords] [Important Dates] [Sales Profile]

File [CALL ITEMS]

3/4/2010 OPPORTUNITY Reducate Investments - JDS (02/17/2010)

5/28/2010 ACTION In-Office Appt. Begin implementing agreed plan. They're ready to 1st CD (\$11k) matures today. - SAB (03/11/2010)

5/27/2010 ACTION Confirm In-Office appt. F. 5/28, 2 pm. Begin implementing plan-CD matures! - SAB (03/11/2010)

5/27/2010 ACTION For appt. tomorrow (or next work day), review Appointment Processing Checklist in folder. - REH (03/11/2010)

5/21/2010 LETTER SETUP Confirm Appointment - Written confirmation of appt. - Enable.

3/11/2010 ACTION In-Office Appt. Review proposal. - REH (03/04/2010)

3/10/2010 NOTE Meeting - SAB: Completely approve proposal, but refuse to start implementing plan until first CD matures. They figure they'd better hang onto their whole small savings account "until we figure out our tea

3/10/2010 ACTION For appt. tomorrow (or next work day), review Appointment Processing Checklist in folder. - SAB (03/04/2010)

3/5/2010 LETTER SENT Confirm Appointment - Written confirmation of appt. - Enable.

3/4/2010 ACTION In-Office Appt. Gather info. - SAB (02/17/2010)

3/4/2010 NOTE Meeting - JDS - Trish has been thoroughly frightened about their financial future. Their investments are virtually all fixed-income, come at busy rates and others at really busy rates. BIV's assured them that

3/3/2010 ACTION Prepare Appointment Processing Checklist for In-Office appt. tomorrow (or next work day). - SAB (02/17/2010)

3/3/2010 ACTION Confirm In-Office Appt. Th. 3/4, 4 pm. gather info. - REH (02/17/2010)

2/25/2010 LETTER SENT Lead Processing-New Prospect-AA-Hot-In-Office Appt - Confirms In-Office appointment w/ Hot new Prospect. - Enable.

2/17/2010 NOTE Outgoing Call - REH - Spoke to Dante's secretary; was expecting call. Checked Susie's spellings of both names with him; they ARE correct. Sat appt. Th. 3/4, 4 pm.

2/17/2010 ACTION Call this referral. Referral is Susie Decatur. - SAB (02/12/2010)

2/12/2010 LETTER SENT Equitas-Welcome-Referral - "Persero" gave me your name." - Enable.

2/12/2010 NOTE Incoming Call - SAB - Susie Decatur called. She's recommended us to Beatrice Portinari; her friend from many community activities. Trish's husband is Prof. Dante Alighieri. Both in their 50s and have been too

9/27/2000 LETTER SENT Service-Signature Required-2nd Message - Signature required message

9/27/2000 LETTER SENT Service-Signature Required-2nd Message - Signature required message

Speed Dialing

Watch for it

Has Questions, Set Call action for...

No Answer/Message.

Spoke w/ Decision Spoke w/ no facts

Spoke w/ Decision met BIV's with d.

Turned Over to RR "Watch for it" call...

LOCAL USER: corall CAPS NUM IN\$ SCPL 1:30 PM 6/19/2001 Admin. QW

FIG. 7



<b>Maintain Contact Group - Oldebucks, Velda</b>				
<b>Contact Group</b>		<input checked="" type="checkbox"/> Auto Correct		
Group Name Oldebucks, Velda	List	Client	No Contact Interval	
Source	Type	Retired	30	
Book	Wealth	C = Cautious	Opportunity Review Interval	180
Communication Status	Communication Channel	Ready Funds		
Normal	Letter			
Last Contact Date	First Contact Date			
4/26/2010	2/22/2010			
Last Message Date	Last Meeting Date			
8/16/2000	2/24/2010			
Last Opportunity Review Date				
2/24/2010	<input type="checkbox"/> Default to Business Address			
Primary System Owner	Nickname Rights	Keywords		
jqsellers	<input checked="" type="checkbox"/> FR	<input type="checkbox"/> Harry Dent's Book		
Secondary System Owner	<input checked="" type="checkbox"/> SA	<input type="checkbox"/> Most Wanted		
sabrokerman	<input type="checkbox"/> SC	<input type="checkbox"/> No Show		
	<input type="checkbox"/> SCA	<input type="checkbox"/> Phase 2 Lead		
	<input type="checkbox"/> SMD	<input type="checkbox"/> Planning		
	<input type="checkbox"/> Sit Min.	<input checked="" type="checkbox"/> International Fax		
Important Information				

**FIG. 8**

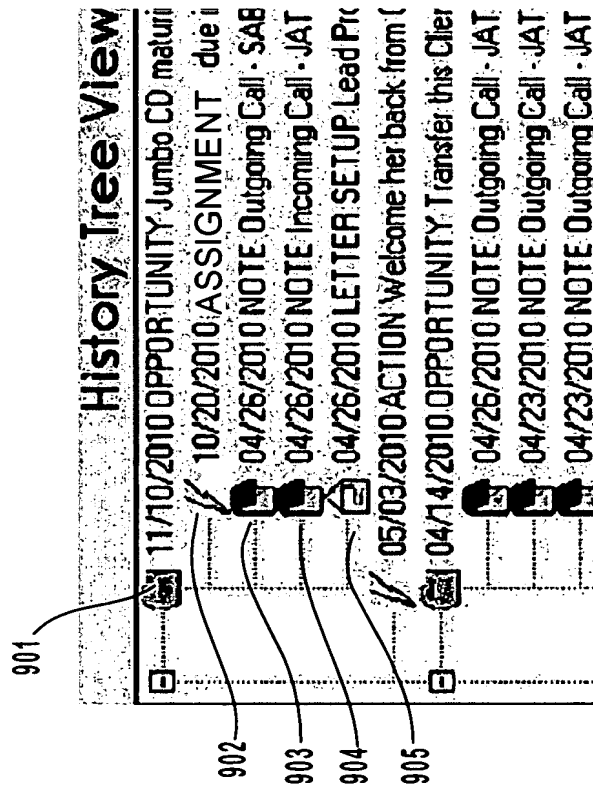


FIG. 9

130

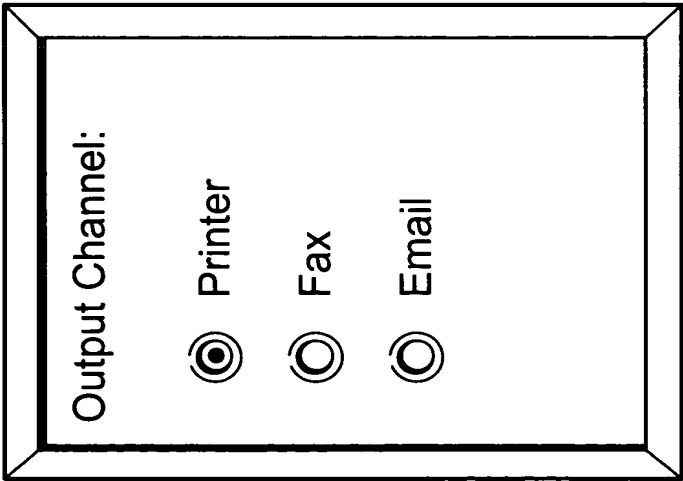


FIG. 10

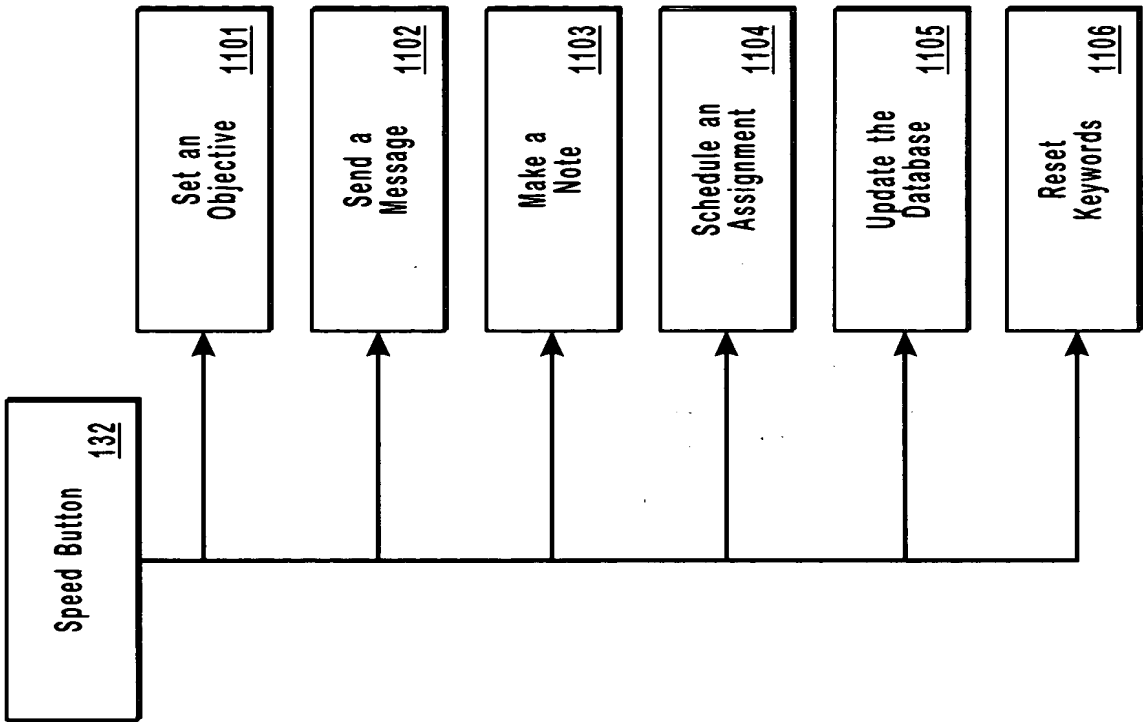


FIG. 11



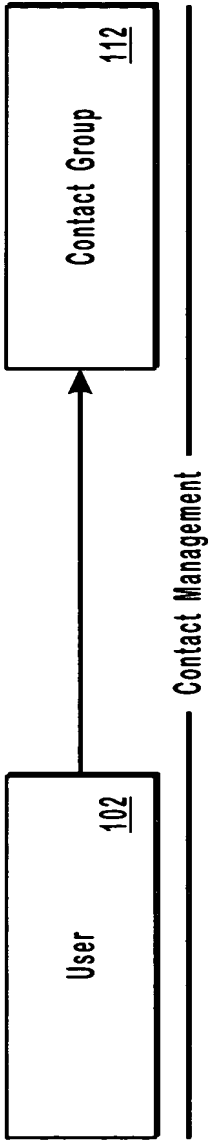


FIG. 13A

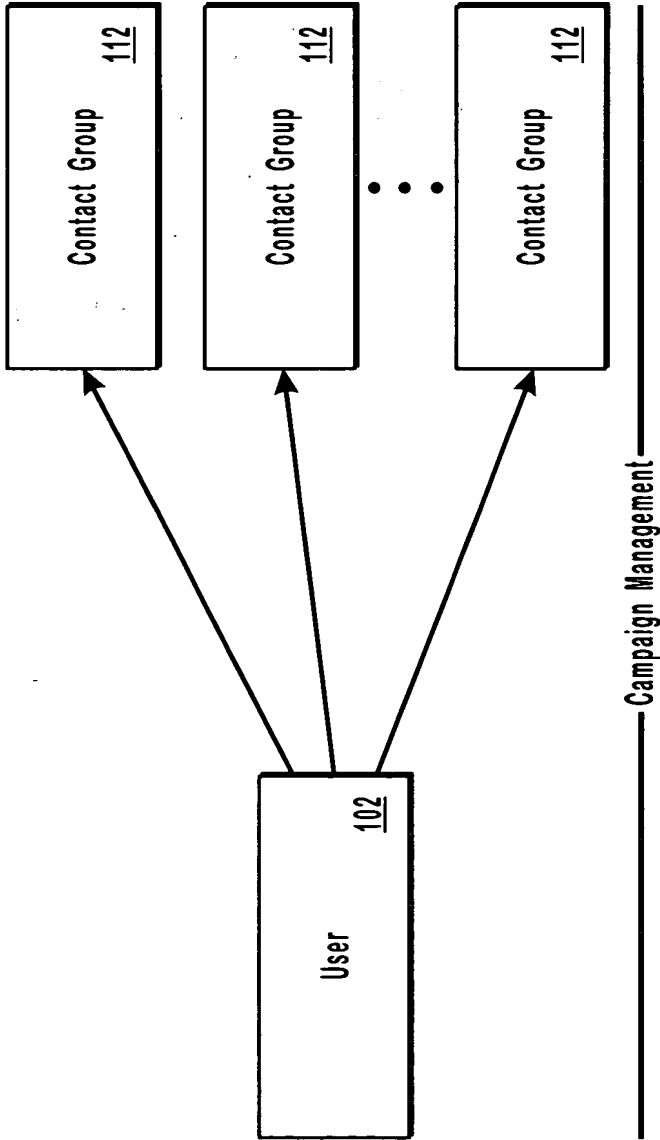


FIG. 13B

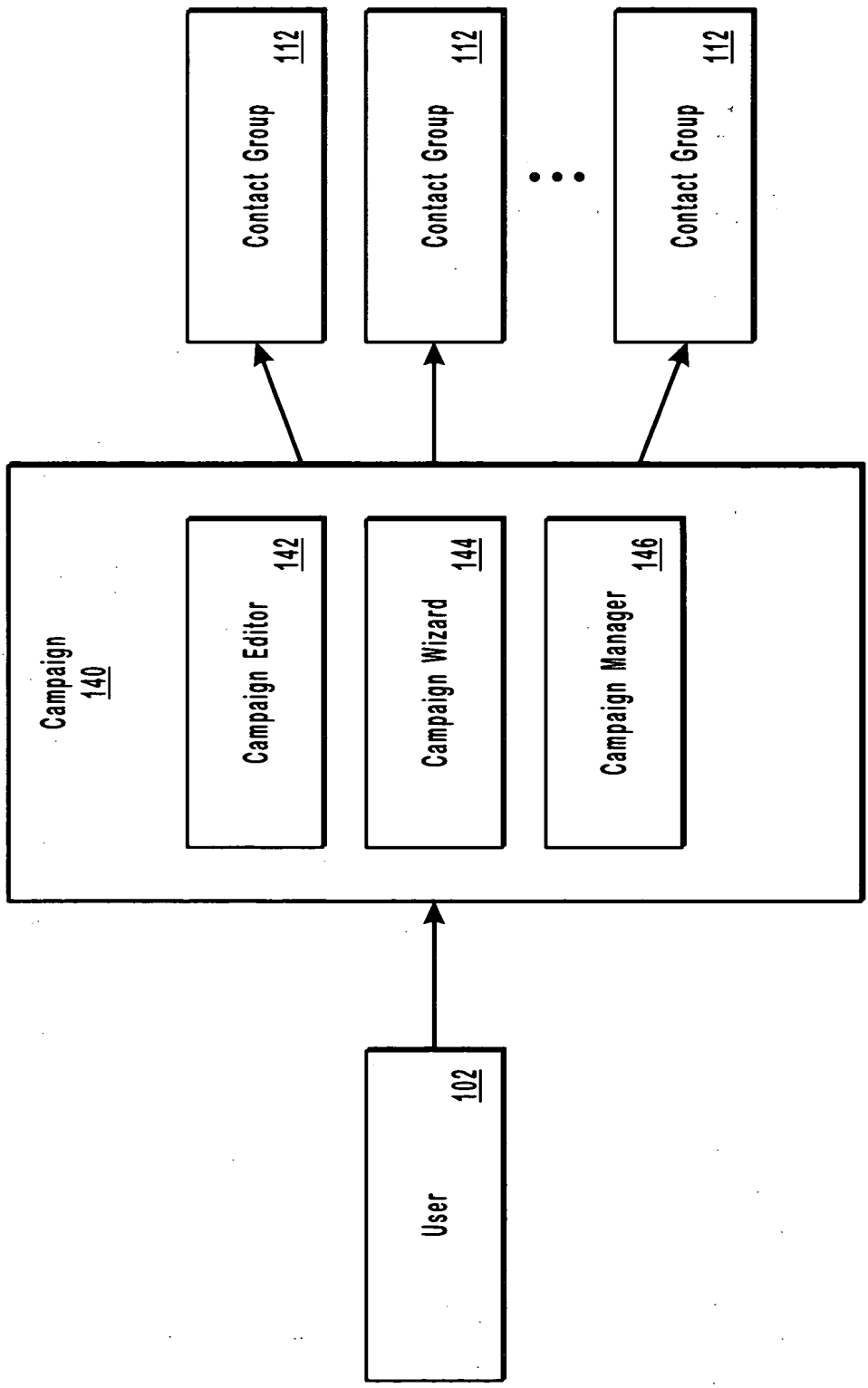


FIG. 13C

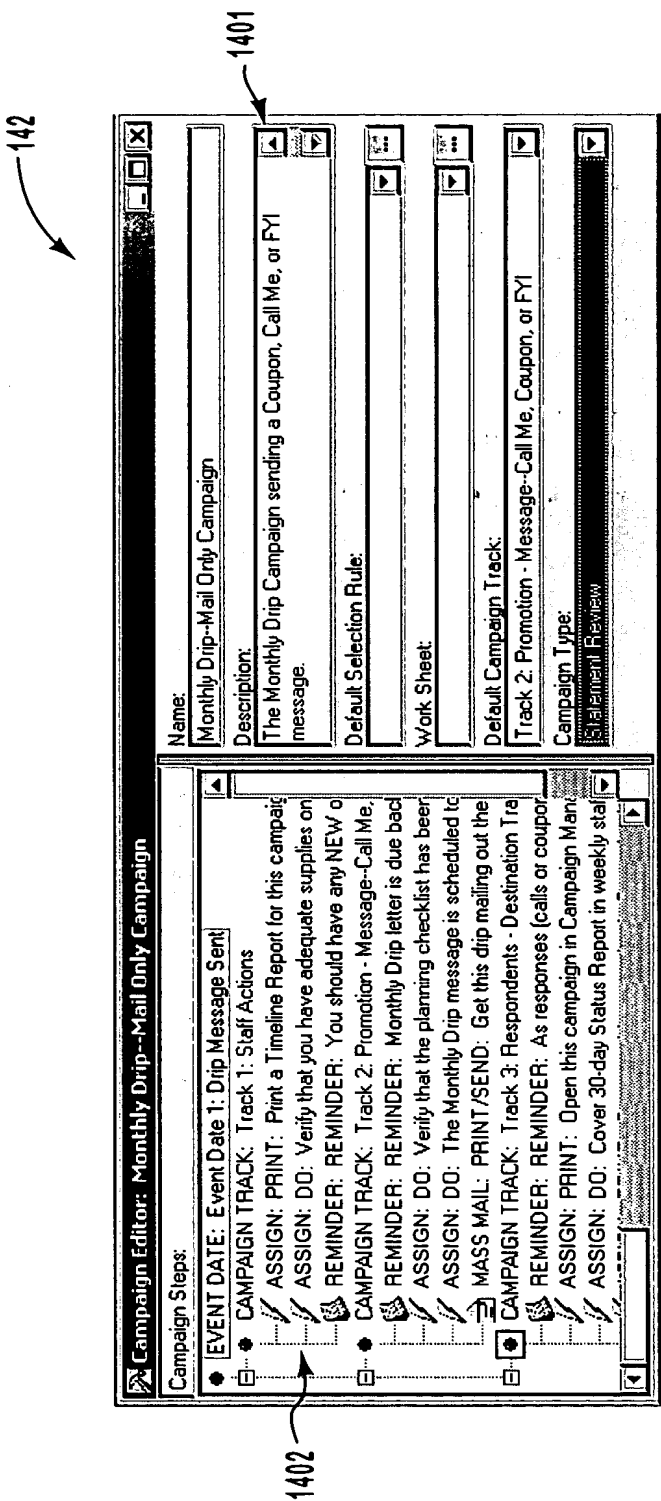


FIG. 14

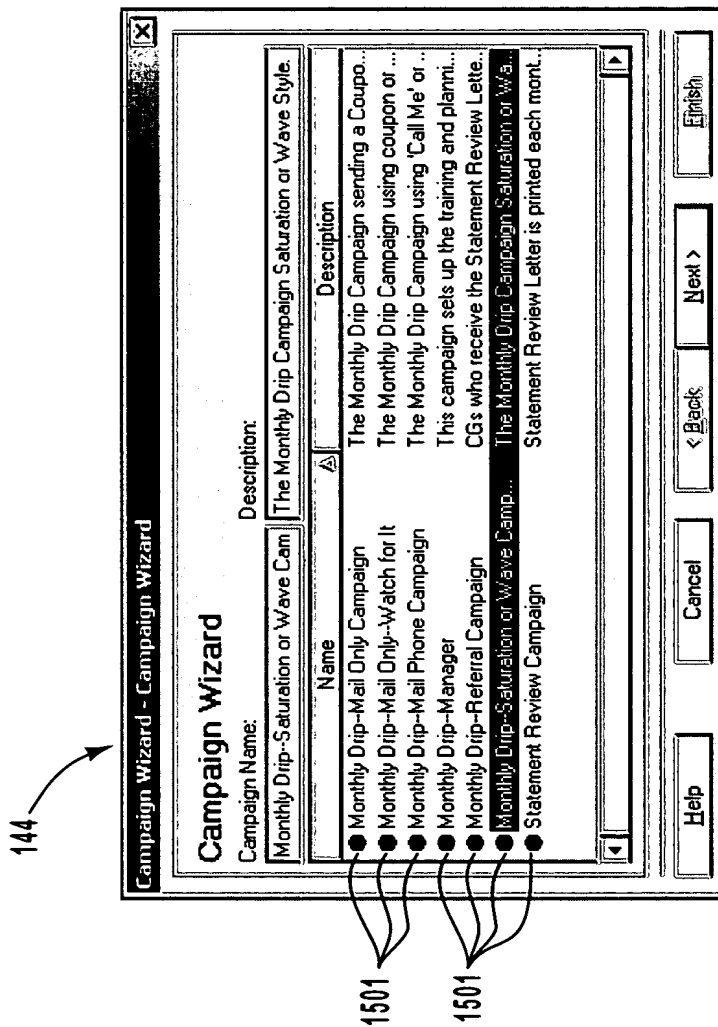


FIG. 15A



144

Campaign Wizard - General Options

General Options

Selection Rule:  
AA-Hot Clients

Team:  
Sue & Jim's Team

Originator:  
corwell

Campaign Post:	Staff Group:	Experience Level
CO	Sue & Jim's CO	Intermediate
RR	Jim RR	Beginner
SA	Sue & Jim's SA	Intermediate
SC	Sue & Jim's SV	Beginner
SCA	Sem Coordinator	Beginner
SMD	Sem Mktg Dir	Intermediate

Help

Cancel

< Back

Next >

Finish

FIG. 15B

144

Campaign Wizard - Event Dates

Event Dates:  
Please fill in the dates for when each event in the campaign is supposed to begin.

Event Date:  
Event Date 1: Drip Letter Mailed

Date:  
08/11/2000

...

Help

Cancel

< Back

Next >

Finish

FIG. 15C

144

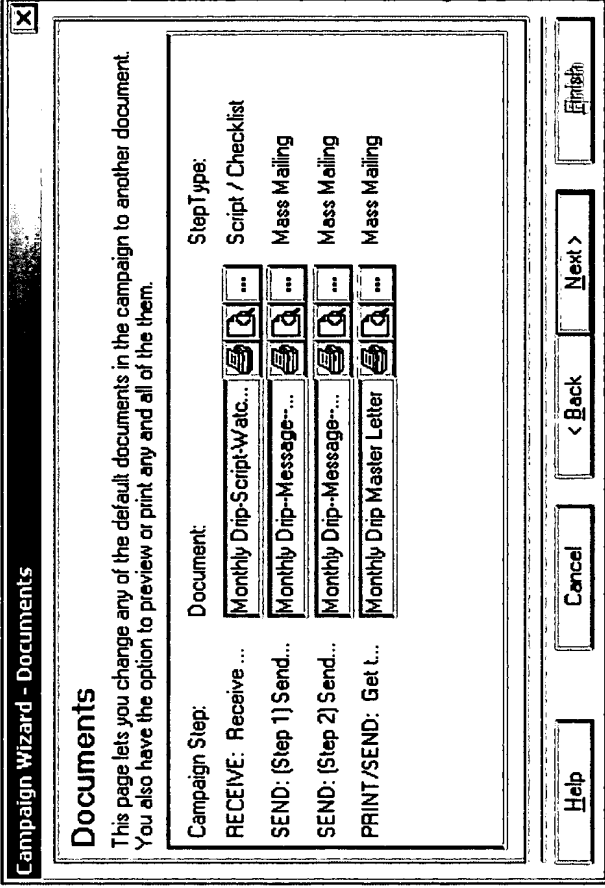


FIG. 15D

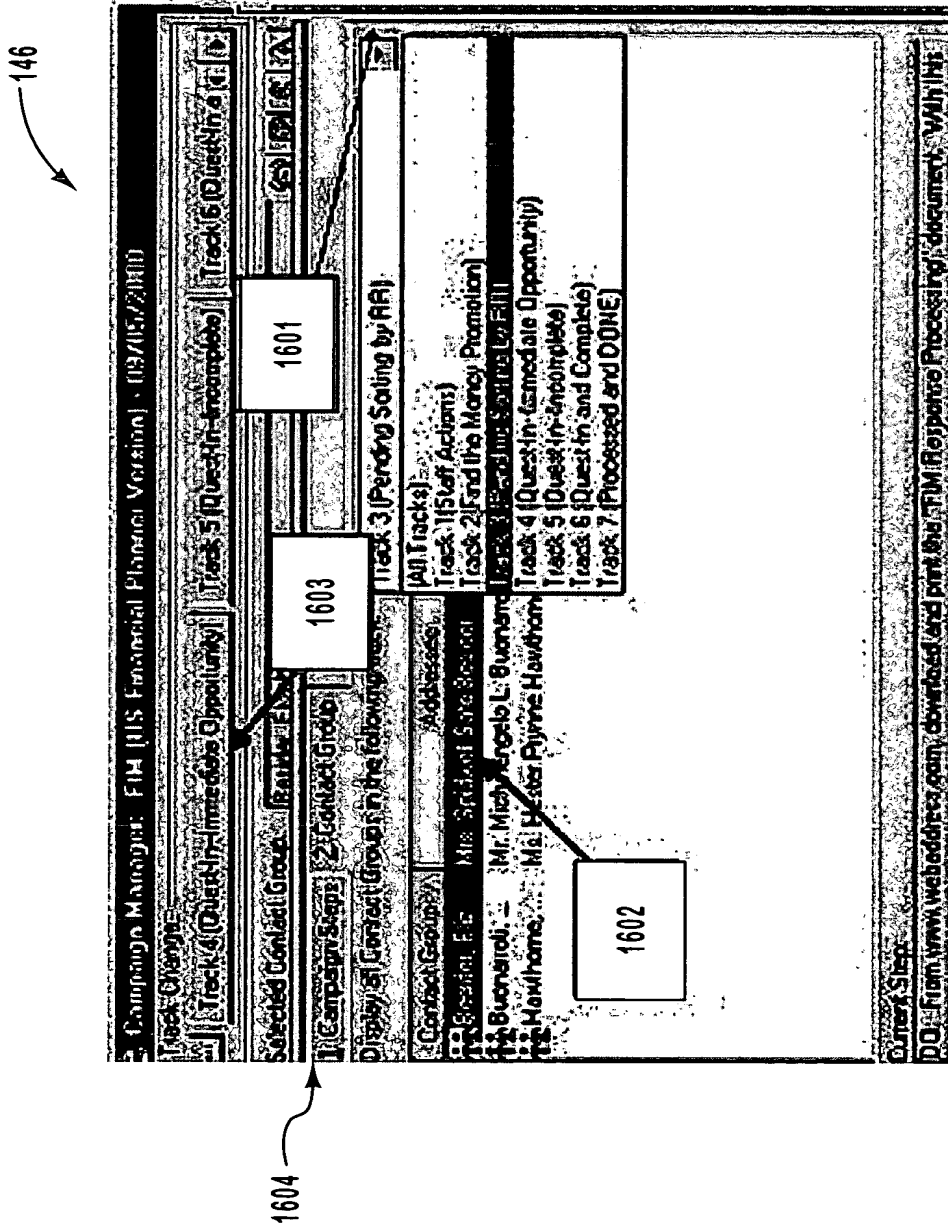


FIG. 16A

T 0 3 0 2 0 " 1 6 9 0 0 5 6 0

146

21 / 21

1606

Graila 2.0 (Playground) - [Campaign Manager: Monthly Drip--Mail Only--Watch for it - 6/27/2001]

File History Contact Group Messages Tools Reports Campaigns Import & Export View Window Help

Track Changes: [Track 1: Staff Actions] [Track 2: Watch for it] [Track 3: Promotion - Coupon or Call Me Message] [Track 4: Responders - Destination Track]

Selected Contact Group: [Unknown]

Worksheet: This Campaign does not have a Worksheet.

Campaign History: 06/30/2000 OBJECTIVE Mail/Phone Seminar Classic Confirmation Style... C3 06/30/2000 LETTER SENT Seminar Message-Invite-Option2 - Seminar...

Apply Processing: [Zed Apex Sets and confs] [3rd 4th, etc., ApplSet and] [GPA-Misc: Cle 41Send set] [E-PackMits: Pro 41Send Pro] [Retch-Misc: Attendz tech] [He-view/Goodwill ApplSet and] [Side to Client Send: Main yps] [Sales in (Interest) Send: Main yps]

1. Campaign Steps [2. Contact Group]

File KALLY?

Date	Event	Description	Staff Group	Event Date	Track	Action Status
7/12/2000	PRINT	Print a list of all the people who are in the group. Print a list of all the people who are in the group.	Sue & Jim's CO	Event Date 1: 7/12/2000	Track 1: Staff Actions	Open
7/14/2000	REMINER	You should have a NEW drip letter for enough through it New or ... Jim RR	Sue & Jim's CO	Event Date 1: 7/14/2000	Track 1: Staff Actions	Open
7/14/2000	DO	Verify that you have adequate supplies on hand for this mailing. Letterhead, b. Sue & Jim's CO	Sue & Jim's CO	Event Date 1: 7/14/2000	Track 1: Staff Actions	Open
7/14/2000	REMINER	Monthly Drip promotional and Watch for it messages and script are ... Jim RR	Sue & Jim's CO	Event Date 1: 7/14/2000	Track 2: Watch for it	Open
7/14/2000	RECEIVE	Receive Monthly Drip Watch for it script. Deliver to SA today	Sue & Jim's CO	Event Date 1: 7/14/2000	Track 2: Watch for it	Open
7/14/2000	SCRIPTED CALL	Watch for it calls to those without an e-mail address or fax num. Sue & Jim's CO	Sue & Jim's CO	Event Date 1: 7/14/2000	Track 2: Watch for it	Open
7/14/2000	DO	Verify that the planning checklist has been completed including populating the...	Sue & Jim's CO	Event Date 1: 7/14/2000	Track 2: Watch for it	Open
7/14/2000	SEND	(Step 1) Send Watch for it message by e-mail to Clients and Prospects with...	Sue & Jim's CO	Event Date 1: 7/14/2000	Track 2: Watch for it	Open
7/14/2000	SEND	(Step 2) Send Watch for it message by fax to those with a fax number setup. Sue & Jim's CO	Sue & Jim's CO	Event Date 1: 7/14/2000	Track 2: Watch for it	Open
7/14/2000	PRINT	(Step 3) After all e-mail messages and fax messages have been sent, print...	Sue & Jim's CO	Event Date 1: 7/14/2000	Track 2: Watch for it	Open
7/14/2000	DO	The Monthly Drip message is scheduled to go out the door tomorrow. Make a...	Sue & Jim's CO	Event Date 1: 7/14/2000	Track 2: Watch for it	Open
7/14/2000	SCRIPTED CALL	Today and/or tomorrow Make a "Watch for it" call to all CGs a...	Sue & Jim's CO	Event Date 1: 7/14/2000	Track 2: Watch for it	Open
7/14/2000	REMINER	As call and/or coupons come in, use the Lead Processing spreadsheet. Sue & Jim's CO	Sue & Jim's CO	Event Date 1: 7/14/2000	Track 2: Watch for it	Open
7/14/2000	PRINT	Open up this campaign in Campaign Manager. Through Reports, print a 3...	Sue & Jim's CO	Event Date 1: 7/14/2000	Track 2: Watch for it	Open
7/14/2000	DO	Cover 30-day Status Report in weekly staff meeting. Jim RR	Sue & Jim's CO	Event Date 1: 7/14/2000	Track 2: Watch for it	Open
7/14/2000	PRINT	Open up this campaign in Campaign Manager. Through Reports, print a 6...	Sue & Jim's CO	Event Date 1: 7/14/2000	Track 2: Watch for it	Open
7/14/2000	DO	Cover 60-day Status Report in weekly staff meeting. Jim RR	Sue & Jim's CO	Event Date 1: 7/14/2000	Track 2: Watch for it	Open

LOCAL [USER: jkelly] CAPS [NUM [ING] SCRL [5:38 PM] 6/27/2001] Alarm Off

1605

1607

FIG. 16B